

## From Silver to Gold!

MAY 2018

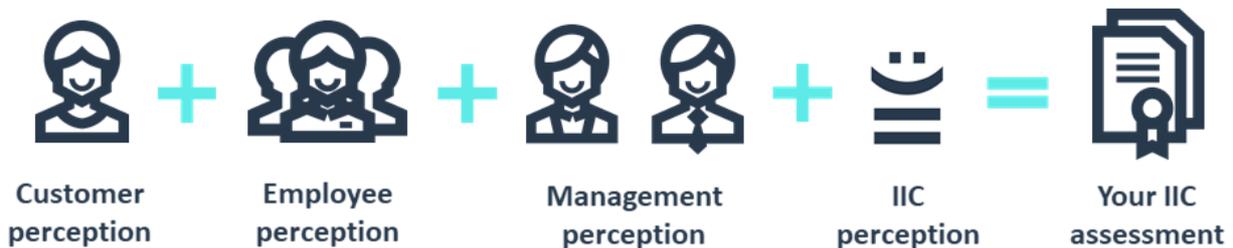


### The Challenge

Fidelius is a leading financial services company providing a range of solutions for individuals and companies including wealth management and employee benefits. They pride themselves in offering exceptional, high quality and dependable service to their clients. Fidelius first worked with Investor in Customers (IIC) in 2016, when they had an excellent first assessment resulting in a Silver award (or two-star 'Outstanding' as it was referred to previously). We left them with an action plan, and worked with them with some consultancy over the interim period, so the challenge was to implement the suggestions and improve the overall customer experience within the firm.

### The Solution

The Investor in Customers (IIC) award is an independent mark of distinction based on a model which measures the customer experience in an impartial way, taking into account internal perceptions as well as the external customer view. There are 3 award levels – gold, silver and bronze which are derived from a published standard and give prospective customers the confidence about the customer experience they will receive from Fidelius. The award is an independent assessment of excellence in the field of customer service and customer relationships and helps awarded companies differentiate themselves from their competitors.



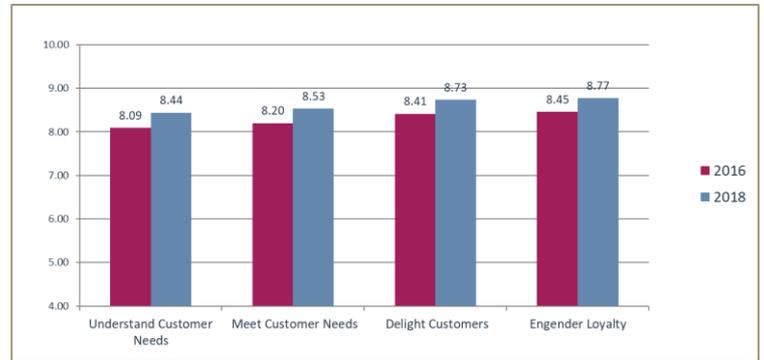
The assessment is built around **four principles of customer experience**: Understand Customer Needs, Meet Customer Needs, Delight Customers and Create Loyalty. These principles are then divided into a further 16 themes.

## The Outcome

The 2018 IIC assessment for Fidelius is Gold!

A really good result with increases across all 4 principles.

The themes 'Quality Relationship' and 'Customer Feedback' were of particular note as clients scored them both over nine out of ten, further proving the relationship Fidelius has with its clients.



Since their last assessment, Fidelius took the action plan we gave them to heart and worked hard to implement some of the changes suggested. This has resulted in steady increases across all sixteen themes. Fidelius are not resting on their laurels however and they are committed to further improvement.

### Comments from clients included:

- "I am extremely satisfied with the service I receive and the way I am dealt with by the company's representative."
- "The people I deal with are knowledgeable, approachable and understanding."
- "Fidelius provides that personal contact that makes me feel valued and in good hands."
- "Fidelius understand client needs and come up with a range of options. They do not harass the client into making a quick decision. Proactive to likely changes in client needs and recommends accordingly."
- "The person who deals with me has always been fair, open and honest, and shows interest in my needs. He is a good listener and had drawn up a product which suits me. He regularly reviews and keeps me informed of what is happening"

**Jim Grant, Chief Executive of Fidelius**, said: 'We are so proud to have achieved an IIC Gold Award. We are committed to the highest level of customer service and it is vital to our business to continually look for ways to meet and exceed the needs of clients. To have increased our rating from Silver to Gold this year is a testament to the hard work of our team'

**Sandy Bryson, Director of Investor in Customers** added: ""I am delighted Fidelius has achieved an IIC Gold award recognising their exceptional client experience. Their team has worked hard implementing the insights that we recommended following their initial assessment. Investor in Customers will continue to support Fidelius with their ongoing commitment and passion to improving customer service."

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### Contact us.

17 Ensign House, Admirals Way, Canary Wharf,  
London, E14 9XQ 0800 024 8895  
Or contact Sharon on 07467 956343  
sharon.clapp@investorincustomers.com

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